



ASK THE SAME QUESTIONS OF EVERY CANDIDATE

Vendor selection checklist

For credentialing services, software or a combination of both. Tick an item only when the answer is supported by a proposal, demonstration or other recorded evidence.

Practice / provider count / locations: _____

Work needed / internal owner: _____

Candidate / proposal date: _____

- ☐ **01. Fit and coverage.** Confirm provider types, practice size, states, locations and payers. Identify exclusions before requesting a price.
- ☐ **02. People or software.** Name who collects records, submits, follows up and handles exceptions. Separate managed services from software access.
- ☐ **03. Scope and completion.** Get included tasks, exclusions and the evidence that marks work complete in writing.
- ☐ **04. Total cost.** Compare the same quantities and period: setup, recurring charges, transactions, integrations, training, extras and renewal changes.
- ☐ **05. Implementation.** Request milestones for cleanup, migration, training, acceptance testing and handover. Name owners on both sides.
- ☐ **06. Support.** Confirm hours, time zones, response targets and escalation. Ask for written confirmation of U.S.-based support if it matters to you.
- ☐ **07. Progress reporting.** See a sample showing last action, blocker, next owner and follow-up date; confirm your access between reports.
- ☐ **08. Systems and data.** Demonstrate the required connections, permissions and change history. Confirm implementation costs and responsibilities.
- ☐ **09. Exit and continuity.** Request a usable export of documents and history; clarify notice, handover, open tasks and any exit charges.
- ☐ **10. Evidence and references.** Check source dates, relevant customer experience and review volume. Company testimonials and sparse ratings are not typical-outcome evidence.

Before you compare prices

Send the same written scope to each candidate. List mandatory requirements separately from preferences and keep unanswered questions visible.



A DECISION YOU CAN EXPLAIN

Compare your shortlist

Use C = confirmed, Q = question open, X = outside scope. Add an evidence reference or note in each cell. These marks are a worksheet, not a vendor rating.

Comparison owner / decision date: _____

Requirement	Vendor A	Vendor B	Vendor C
Company / product			
Scope and coverage			
Responsibilities and support			
Total cost / billing unit			
Implementation and training			
Integrations / reporting			
Export / exit arrangements			
Open mandatory requirements			

01 Test one realistic exception

Use fictional records in a demo: introduce a missing document, assign the next action, escalate an overdue task and export the result. For a service, ask to see how the same case appears in its progress report.

02 Record the decision and the next step

Preferred option / reasons for fit: _____

Unresolved requirement / owner / due date: _____

Next action / decision-maker: _____

A company statement is not independent proof of results. Confirm material promises in the final scope and have the appropriate adviser assess agreement terms.

Build a comparison you can share

Compare up to three providers at credentialingreviews.com/compare/. Save or share your shortlist; no account required.